

Schedule 26

NEBRASKA LIBRARY COMMISSION

Nebraska Records Management Division
440 South 8th Street, Suite 210
Lincoln, NE 68508
(402) 471-2559

**REQUEST FOR APPROVAL OF RECORDS RETENTION
AND DISPOSITION SCHEDULE**

SCHEDULE NUMBER	26
AGENCY, BOARD OR COMMISSION	NEBRASKA LIBRARY COMMISSION
DIVISION, BUREAU OR OTHER UNIT	
Supersedes Edition of April 4, 1978	

**TO: STATE RECORDS ADMINISTRATOR
STATE OF NEBRASKA**

PART I -- AGENCY STATEMENT

In accordance with Section 84-1212.01, R.R.S. 1943, approval of the attached records retention and disposition schedule by the State Records Administrator is hereby requested. Retention periods and dispositions have been recommended by this agency after a careful evaluation of all factors listed in Section 84-1212.01, R.R.S. 1943.

SIGNATURE * <i>Rodney D. Wagner</i>	
TITLE <i>Director</i>	DATE 2-23-90

PART II -- ARCHIVAL APPROVAL

The attached schedule has been analyzed, all archival and historical material has been properly identified, no disposition except by transfer to the State Archives has been recommended for such material, and this schedule is approved as submitted.

SIGNATURE * <i>Andrew I. Paul</i>		DATE 2/28/90
Asst. STATE ARCHIVIST		

PART III -- APPROVAL BY STATE RECORDS ADMINISTRATOR

The attached schedule has been reviewed in accordance with Section 84-1212.01, R.R.S. 1943, and is approved as submitted.

SIGNATURE * <i>Allen J. Reumann</i>		DATE March 2, 1990
ADMINISTRATOR		

INSTRUCTIONS FOR USING THIS SCHEDULE

Records retention and disposition schedules are designed to serve as your records management guidelines for storing and disposing of agency records, regardless of the media on which they reside. This schedule was written specifically for records unique to your office and the State Agencies General Records Schedule #124 contains those records common to most state government agencies. These retention schedules, which are approved by the State Records Administrator, provide your only ongoing authority to dispose of records. Listed below are some basic procedures to follow when applying your schedule.

DISPOSING OF RECORDS

1. Check your schedules to see what the retention period is. Note: Your agency's unique schedule will take precedence over State Agencies General Records Schedule #124 for any items which have differences in retention requirements.
2. Dispose of records that have met their retention periods.
3. Complete a Records Disposition Report for the records you dispose. The Records Disposition Report form is the last page of this schedule. Remove the form, photocopy it, complete the form, make a photocopy for your records, and send the completed form to the Records Management Division at the address below. If you wish, you may receive this form electronically by contacting the Records Management Division. This report establishes that the destruction was performed in your normal course of business.

Please remember to retain the blank form for future use.

NON-SCHEDULED RECORDS

Contact a Records Management Consultant in Records Management to see whether the records will fit under an item already on the schedule. If they do not, they must be retained until they are added to the next revision of your schedule.

SCHEDULE UPDATE

It is the responsibility of each agency to periodically update their schedule. A Records Management Consultant in Records Management can assist you with the schedule update, which involves adding new records and making revisions to existing items. Keeping your schedule current will ensure that you have the ongoing authority to discard records when their useful life has ended.

QUESTIONS

If you have any questions about these procedures, please contact your agency Records Officer or your Records Management Consultant in Records Management. We will help you with any questions the schedule may present, including: transferring records to the State Records Center or State Archives, microfilming records, scanning records, etc.

**Records Management Division
440 South 8th Street, Suite 210
Lincoln, NE 68508-2294
402-471-2559**

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SCHEDULE 26 – NEBRASKA LIBRARY COMMISSION

26-1 ADMINISTRATION

26-1-1 CHECK LIST FOR RECEIPTS

List of checks by services, used to make up receipts.

Dispose of after 3 years, provided audit has been completed.¹

26-1-2 CHECK LISTING

Daily list of checks received.

Dispose of after 3 years, provided audit has been completed.¹

26-1-3 DIRECT BILLING AUTHORIZATION

Authorization sent to motels/hotels authorizing direct billing for lodging cost.

Dispose of after payment has been made.

26-1-4 INVOICES

Invoices created to bill individuals/vendors for various services and products (film rentals, tape duplication, NELCMS, etc.).

Dispose of after 3 years, provided audit has been completed.¹

26-1-5 MASTER MAILING LIST

List of contact person, agency/library, address, phone number and other pertinent information used to make up labels for various mailings, and NLC Library Directory.

Dispose of individual listings when they become obsolete.

26-1-6 OCLC/NEBASE BILLINGS

Includes: ledger sheets, invoices, OCLC Sales Institutions Detail, Telecommunications Charges and OCLC Sales Product Detail.

Dispose of after 3 years, provided audit has been completed.¹

26-1-7 SUMMER READING PROGRAM ORDERS

Orders received from libraries for Summer Reading Program materials.

Dispose of after 3 years, provided audit has been completed.¹

26-2 DOCUMENTS, STATE AND FEDERAL

26-2-1 AGENCY FILE

3 x 5 index card with agency name and contact person for publications.

Dispose of after superseded.

26-2-2 CLEARINGHOUSE HISTORY FILE

Narrative material used in developing a program of operation for the Publications Clearinghouse.

Dispose of information after 10 years; subject to review by the State Archivist before disposal for possible accession.

26-2-3 PUBLICATION INFORMATION FORM

Form provides basic publication data. Includes agency, title of publication, series title, date, price, availability of item.

Dispose of after 3 years.

26-2-4 PUBLICATIONS CLEARINGHOUSE PUBLICATIONS

State publications received from state agencies are selected for conversion to Microfilm on the basis of the "photo qualities" and content. A paper copy, in addition to the Microfilm copy, is kept in the collection if enough paper copies are available.

ORIGINAL COPIES: Microfilm for security; transfer one paper copy to the State Archives for permanent retention; dispose of all other paper copies after shelving space is no longer available.

SECURITY MICROFILM: Transfer to the State Archives; retain permanently.

MICROFILM WORK COPY: Retain permanently.

26-2-5 SERIAL RECORD CARDS

Previously named Publications File Cards. Shelf list of documents for every state and federal publication acquired by the Publications Clearinghouse. Each is assigned a number and maintained by number. Subsequent issues acquired by the Clearinghouse are noted on the cards.

STATE PUBLICATION SERIAL RECORD CARDS: Retain permanently or dispose of after computerization is adopted.

FEDERAL PUBLICATION SERIAL RECORD CARDS: Dispose of after 5 years.

26-2-6 STATE PUBLICATIONS CHECKLIST ABSTRACTS (SPA 090)

State publications are received and entered into a serial record file which is retained as a permanent record of what has been published by agencies and sent to the Clearinghouse on deposit. These publications are examined and a summary of their contents is entered into the state's computer system.

PAPER PRINTOUT: Dispose of after superseded.

SECURITY MICROFILM: Transfer to the State Archives; retain permanently.

MICROFILM WORK COPY: Dispose of after updated. Retain final issue of each volume permanently.

26-2-7 STATE PUBLICATIONS CHECKLIST INDEX

The Nebraska State Publications Checklist index is generated from the original abstracting of each document on the state computer. The index consists of the author/agency field, title field, and subject field. It is continuously updated and interfiled every two months when the Checklist is received and sent out to subscribers. COM copies are discarded with every update.

PAPER PRINTOUT: Dispose of after superseded.

SECURITY MICROFILM: Transfer to the State Archives; retain permanently.

MICROFILM WORK COPY: Dispose of after superseded.

26-2-8 STATISTICS OF THE PUBLICATIONS CLEARINGHOUSE

Monthly form shows the number of documents processed into and withdrawn from the Clearinghouse (used for annual statistics.)

Dispose of after completion of annual report.

26-3 FILMS

26-3-1 CONFIRMATION NOTICE PRINTOUT (FAB220 AND UFB220)

Daily form received from CDP confirming booking of film and audio-visual items.

Dispose of after 1 year.

26-3-2 FILM/AUDIOVISUAL ORDER/INVENTORY FORM

Order form filled out whenever a film or audiovisual item is received (3-part form).

FILM DEPARTMENT COPY: Dispose of after catalog is produced adding these films.

ACQUISITION/CATALOGING DEPARTMENT COPIES: Dispose of after computerization is adopted.

26-3-3 FILM/AUDIOVISUAL SUPPLEMENT COMPUTER REPORT (OBSOLETE)

Obsolete computer report that listed films available for checkout.

Immediately dispose of film and paper copies.

26-3-4 INVOICES, FILM AND AUDIO-VISUAL

Produced by Central Data Processing on a monthly basis, copies are mailed out to patrons for payment.

Dispose of after 3 years, provided audit has been completed.¹

26-3-5 MAILING LABEL PRINTOUT

Printout of mailing labels for films and audio visuals to be sent out that day.

Dispose of after 3 months.

26-3-6 METERED-POSTAGE FILM RETURN CARDS

Address cards showing cancelled postage date of when film was mailed back to the Library Commission.

Dispose of after 1 year.

26-3-7 OVERDUE LIST, FILMS (Forms FAB220 and UFB 220)

Daily printout from CDP listing films that have not been returned.

Dispose of after 3 months.

26-3-8 REQUEST FORMS, FILMS

Forms sent in requesting rental of films/audio visuals.

Dispose of after request is booked on computer.

26-3-9 SUBJECT LIST, FILMS (NFS 250 AND NFS 260)

Listing of films by subject.

Dispose of after superseded.

26-4 INTERLIBRARY LOAN AND REFERENCE

26-4-1 ACTIVITY REPORTS

Reports used to compile monthly statistic report. Includes: ILL items loaned from NLC collection; ILL items borrowed from other libraries/institutions; information requests received; information requests filled; location requests received; location requests filled; direct borrowing service placed on NELCMS, log sheets; ILL charges; NLC circulation; database searches; jobline request; circulation computer printout and record sheet; individual log sheets kept by Interlibrary Loan and Reference staff; online search log sheets kept by searchers.

Dispose of 1 year after annual report has been published.

26-4-2 ELECTRONIC BULLETIN BOARDS

Request for books or periodicals using any electronic mail system (Alanet, Dialog, Docline, etc.)

BOOK REQUESTS: Dispose of after 2 years.

PERIODICAL REQUESTS: Dispose of after 4 years.

26-4-3 HISTORICAL FILE

Material used for reference purposes (materials from workshops attended, samples of forms, etc.)

Dispose of after no longer of reference value.

26-4-4 INTERLIBRARY LOAN REQUEST FROM PATRONS

Request for books or periodicals.

BOOK REQUESTS: Dispose of after 1 year.

PERIODICAL REQUESTS: Dispose of after 4 years.

LIBRARY COMMISSION EMPLOYEE REQUESTS: Dispose of after employee is no longer employed by NLC.

CORRECTIONS DEPARTMENT REQUESTS: Dispose of after 2 years.

26-4-5 MONTHLY STATISTICAL REPORT

Statistical report compiled from Activity Reports (see 26-4-1 and 26-4-11).

Dispose of 1 year after annual report has been published.

26-4-6 NELCMS FILES

Nebraska libraries CMS files. Various electronic messages between Nebraska libraries for interlibrary loan requests, announcements, and bulletin board messages.

INTERLIBRARY LOAN MESSAGES AND RESPONSES: Dispose of after 3 months.

BULLETIN BOARD AND BROADCAST MESSAGES: Dispose of after 1 year.

26-4-7 NELCMS STATISTICAL REPORT

By individual library, a statistical summary of the interlibrary loan transactions--both borrowing and lending. Produced monthly and cumulated quarterly.

MONTHLY REPORTS: Dispose of after 2 years provided quarterly report has been completed.

QUARTERLY REPORTS: Dispose of after 5 years.

26-4-8 NEUCAT (OBSOLETE APRIL, 1986)

A Microfilm listing of the books owned by the major Nebraska libraries. Last edition (13th) produced in April 1986.

SECURITY MICROFILM: Transfer to the State Archives; retain permanently.

MICROFILM WORK COPY: Retain 1 copy of each edition for use in Interlibrary Loan.

26-4-9 NEULIST

A Microfilm listing of the serial titles owned by the major Nebraska libraries. Produced quarterly.

SECURITY MICROFILM: Transfer to the State Archives; retain permanently.

MICROFILM WORK COPY: Retain permanently.

26-4-10 ONLINE SEARCHES

Paperwork compiled to do search.

Dispose of after 1 year.

26-4-11 STATISTICAL FILE

Circulation, bibliographic, subject request, direct borrowing service, interlibrary loan, interlibrary loan charges, database searches, jobline, documents processing statistics used to compile monthly report.

Dispose of after 5 years provided information has been published in annual/biennial report.

26-4-12 UNION CATALOG (OBSOLETE)

Card catalog on each book held by participating libraries. This is no longer being maintained.

Dispose of after computerization is adopted.

26-5 LIBRARY DEVELOPMENT

26-5-1 CONSTRUCTION GRANTS (LSCA)

Federally funded program for library construction. Includes: completion report, notification of construction project completion, report of examination, application and contracts which includes contract for buildings; construction payments including equipment invoices; Library Services and Construction Act form; construction wage rates and payroll sheets; and construction specifications.

Dispose of 5 years after final payment has been made, provided audit has been completed.¹

26-5-2 CONTINUING EDUCATION ATTENDANCE FORM

Individuals submit forms attached to the public librarian re-certification application when applying for re-certification. The form is to record and verify attendance and contact hours at continuing education activities.

IF RE-CERTIFICATION APPLICATION IS RECEIVED: Retain permanently attached to re-certification application.

IF RE-CERTIFICATION APPLICATION IS NOT RECEIVED: Dispose of 1 year after re-certification date.

26-5-3 LEARNING ACTIVITY WRITTEN SUMMARY

Individuals submit forms attached to the public librarian re-certification application when applying for re-certification. The form is to record a program, workshop, seminar, etc. attended for continuing education contact hours for re-certification.

IF RE-CERTIFICATION APPLICATION IS RECEIVED: Retain permanently attached to re-certification application.

IF RE-CERTIFICATION APPLICATION IS NOT RECEIVED: Dispose of 1 year after re-certification date.

26-5-4 LIBRARY ACCREDITATION APPLICATION FORM

Libraries submit applications to the Commission to become an accredited public library. Public libraries need to complete an application on an annual basis. The form is used in conjunction with the manual **GEARING UP FOR THE TWENTY-FIRST CENTURY: GUIDELINES FOR EXCELLENCE**. Previous year's applications are needed to check against current application.

Dispose of after 3 years.

26-5-5 LIBRARY SERVICE AND CONSTRUCTION ACT FILE

Library Services and Construction Act (LSCA) is a federally funded program designed to expand individual library services statewide. Includes: Annual Program, Annual Report, Long Range Plan, Agreements, Library Grant Application, letters of notification of grant awards, reports from sub-recipients, site visit reports, audits of sub-recipients, letters of information from the U.S. Department of Education, and related paperwork.

Dispose of after 5 years, provided audit has been completed.¹

26-5-6 LIBRARY STATISTICAL REPORTS

Libraries submit annual reports to the Commission providing information about basic library functions. Data includes: librarian, library hours, print and non-print collections, collection circulation, budget, income, expenditures, library staff, library board and other information about library activities. The data is used in producing statistics. The information collected is shared with a national program of data collection and dissemination. These reports are often checked for information not included in the annual report.

Dispose of after 5 years, provided audit has been completed.¹

26-5-7 PROGRAM APPROVAL FOR LIBRARY CONTINUING EDUCATION

Education providers (individuals, groups, organizations, etc.) submit to the Commission for pre-approval of a program, workshop, seminar, etc. being given for continuing education contact hours in conjunction with the public librarian certification program.

Dispose of after 5 years.

26-5-8 PUBLIC LIBRARIAN CERTIFICATION/RE-CERTIFICATION APPLICATION

Individuals submit applications, with appropriate education documents, to the Commission to become a certified public librarian. Every three years, individuals must submit re-certification applications, with appropriate documentation for education and continuing education contact hours, to the Commission to remain a certified librarian.

IF RE-CERTIFICATION APPLICATION IS RECEIVED: Retain permanently attached to re-certification application.

IF RE-CERTIFICATION APPLICATION IS NOT RECEIVED: Dispose of 1 year after re-certification date.

26-5-9 QUESTIONNAIRES AND SURVEYS

The Commission periodically sends out questionnaires and conducts surveys to help in evaluating the effectiveness of Library Commission programs.

Dispose of when no longer of reference value.

26-5-10 STATE AID FORMS

Public libraries submit applications to the Commission providing information about basic library functions that are required to receive state aid monies. Information required includes: equal access to service, public funding, free service to residents, payment of minimum wage, amount of local expenditures, and other similar facts.

Dispose of after 3 years, provided audit has been completed.¹

26-5-11 WORKSHOP MATERIALS

Workshop materials include all work papers which went into the development of the workshop. Materials include applications to the conference, brochures, programs and evaluations of what transpired.

Dispose of when no longer of reference value.

26-6 LIBRARY FOR THE BLIND AND PHYSICALLY HANDICAPPED

26-6-1 APPLICATION FORM, FACILITY

Becomes part of the borrower's file.

Dispose of concurrently with BORROWER'S FILE.

26-6-2 APPLICATION FORM, INDIVIDUAL

Becomes part of borrower's file.

Dispose of concurrently with BORROWER'S FILE.

26-6-3 BORROWER'S FILE

The application form contains confidential information about each borrower, as well as certification that the patron qualifies to use the services for the blind and physically handicapped.

APPLICATION FORM OF PATRONS WHO ARE DECEASED: Dispose of at the end of the current federal statistical reporting period.

APPLICATION FORM OF PATRONS WHO BECOME INACTIVE: Dispose of 5 years after becoming inactive.

ALL OTHER CONTENTS OF BORROWER FILE: Dispose of when superseded by computer files.

26-6-4 CARD CATALOG

Description of publication content and where located.

Dispose of after book is removed from the library, or after computerization is adopted.

26-6-5 DISPOSITION RECORD

Disposition reports are filed on talking books and cassette machines which are lost, stolen, damaged or transferred.

Dispose of when machine is recovered or declared obsolete, or when superseded by computer files.

26-6-6 EQUIPMENT REPAIR REPORT, ANNUAL

Annual report sent to Library of Congress listing number of machines repaired.

Dispose of after 5 years.

26-6-7 EQUIPMENT VERIFICATION

Letters are sent to borrowers (every 3-4 years) listing the equipment they should have and they send the commission written verification.

Dispose of after verified against machine cards and computer records.

26-6-8 MACHINE CARD

Card lists equipment model and serial number.

Dispose of when machine is transferred to another state, or when machine is returned from borrower and declared obsolete, or when superseded by computer files.

26-6-9 MACHINE CHECKOUTS

Cards are maintained on all machines that are checked out, such as cassette tape recorders, talking book machines, etc. List name of individual who machine is checked out to and serial number of machine.

Dispose of upon cancellation from program, or when superseded by computer files.

26-6-10 MACHINE REPORT, MONTHLY

Copy of report filed with the Library of Congress. Indicates talking book and cassette machines ready for assignment and those waiting for repair. Also lists machines which are lost or stolen.

Dispose of after 1 year.

26-6-11 MAGAZINE MASTER FILE OR CHECKOUTS

File is used in checking out cassette recorded magazines for people.

Dispose of after superseded or subscription is cancelled.

26-7 LIBRARY RESOURCE CENTER

26-7-1 ACQUISITION ACCOUNT BOOK

Listing of items ordered. Includes date, amount, sources, items, and cost. Is used for verification of invoice payment.

Dispose of after 3 years, provided audit has been completed.¹

26-8 TECHNICAL SERVICES

26-8-1 ACTIVITY REPORTS, NEBASE

Monthly reports submitted to OCLC (Online Computers for Library Centers) detailing NEBASE activities such as: workshops given, libraries trained to use OCLC Services, support given to libraries, etc.

Dispose of after 5 years.

26-8-2 MUTRS

OCLC Marketing and User Trend Reports (MUTRS) are statistical reports received from OCLC and broken down in a variety of ways showing usage of OCLC by NEBASE libraries. The cataloging, interlibrary loan, searching, and other types of activities can be traced and compared from year to year. Reports include levels ranging from the individual institution to overall network activity.

MONTHLY REPORTS: Dispose of after 2 years.

QUARTERLY REPORTS: Dispose of after 3 years

ANNUAL REPORTS: Dispose of after 5 years.

26-8-3 NEBASE ORDERS

Dispose of after 4 years.

26-8-4 OCLC LIBRARY PROFILE

Questionnaire is filled out by libraries/institutions who are members of the Online Computer Library Center (OCLC).

Retain permanently.

26-8-5 PROMOTIONAL PLANS, NEBASE

Dispose of after 5 years.

26-8-6 WORKSHOP CATALOGS, NEBASE

Dispose of after 5 years.

26-9 EDUCATION INFORMATION CENTER

26-9-1 EDUCATION INFORMATION CENTER FILES

Project funded by Kellogg Foundation, includes contracts with EIC sites, quarterly reports from EIC sites, annual report to Kellogg including financial report, work papers, and promotional materials.

PROMOTIONAL MATERIALS: Transfer to EIC sites or Library Systems.

ALL OTHER RECORDS: Dispose of after 5 years, provided audit has been completed.¹

NOTE

1. These records may be disposed of after the required retention period provided the audit of the Comprehensive Annual Financial Report (CAFR) is complete and any required federal audit is complete, and all related audit comments have been resolved. Check with the organization that performed the audit, either the Auditor of Public Accounts or the federal cognizant agency, if there is a question whether resolution is complete

RECORDS DISPOSITION REPORT

TO: SECRETARY OF STATE RECORDS MANAGEMENT DIVISION 440 S. 8TH STREET SUITE 210 LINCOLN, NE 68508-2294	AGENCY
	DIVISION
	SUB-DIVISION

REQUIRED INFORMATION:

In accordance with the Records Management Act, records of this agency have been disposed of under the authorization granted by the following schedule(s):

SCHEDULE NUMBER(S) ONLY (DO NOT INCLUDE SECTION AND ITEM NUMBERS)	TOTAL VOLUME DISPOSED (SEE REVERSE)

OPTIONAL INFORMATION (FOR YOUR USE ONLY):

You may include detailed information which will be useful to you in recording exactly what records were disposed of and under what authority. This might include such things as schedule section and item numbers, title of records, inclusive dates of records, etc. This information is not required to be filed with Records Management.

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DATE	SIGNATURE
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SEND ORIGINAL TO RECORDS MANAGEMENT. MAKE A PHOTOCOPY FOR YOUR RECORDS.

RMA 03006D

VOLUME ESTIMATING GUIDE

**(PLEASE NOTE THAT FOR REPORTING PURPOSES, A BALLPARK
ESTIMATE OF THE TOTAL VOLUME OF MATERIAL DISPOSED IS
ADEQUATE.)**

Vertical File Cabinet, 4 drawer letter-size	6 cubic feet
Vertical File Cabinet, 4 drawer legal-size.....	8 cubic feet
Lateral File, 4 drawer/shelf letter-size	9 cubic feet
Lateral File, 4 drawer/shelf legal size	12 cubic feet
Records center carton.....	1 cubic foot
About a pickup load	50 cubic feet